PSJ14 Janssen Opp Exh 19 – JAN-MS-00309606

DURAGESIC

Positioning Evolution Overview

June 1, 2002

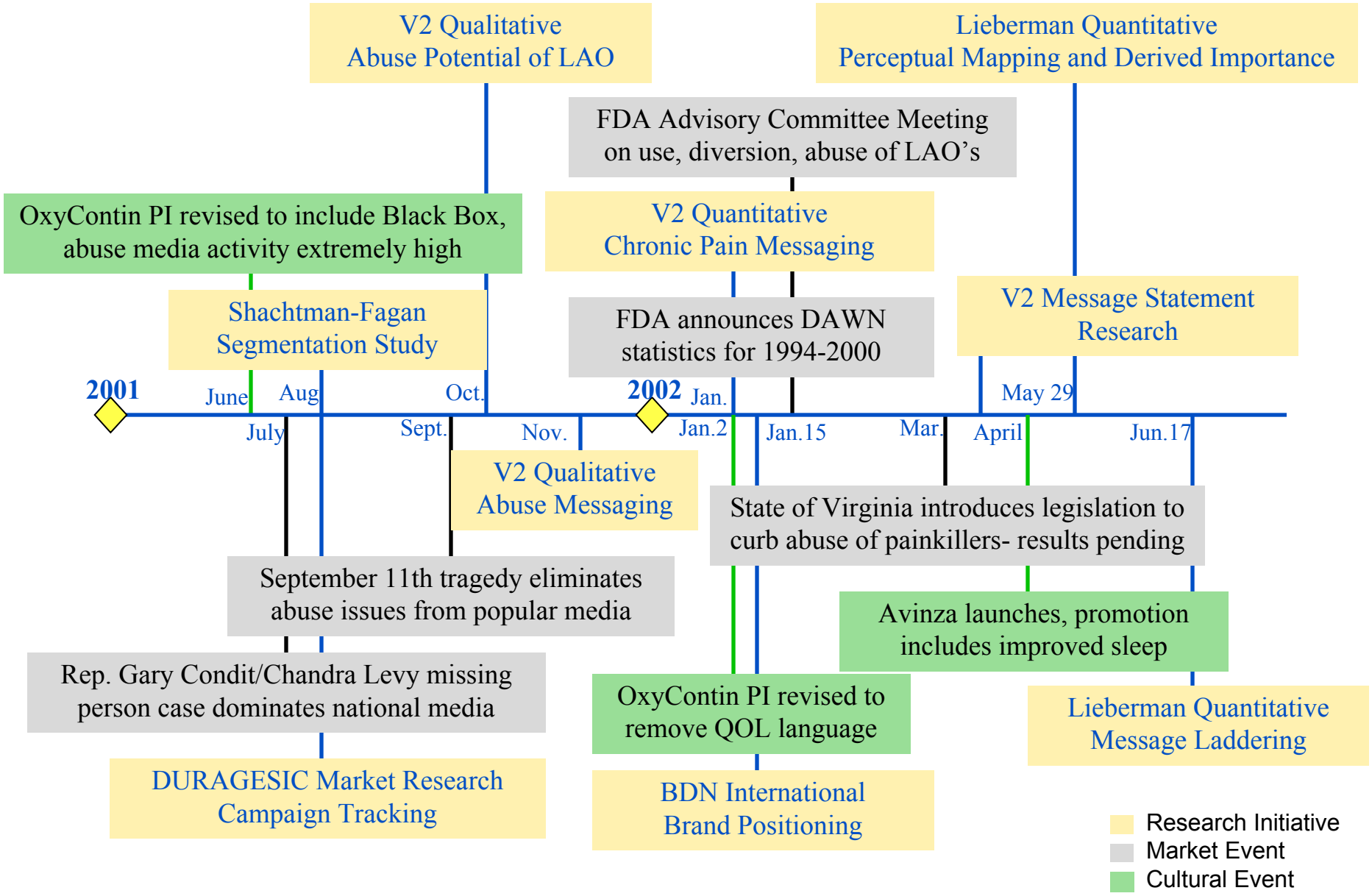
DURAGESIC Positioning Statement Research

- Research Initiatives Timeline
  - August 2001, Shachtman-Fagan Segmentation Study (n=540)
  - August 2001, DURAGESIC Market Research Campaign Tracking, Source PERQ/HCI September 2001(n=225)
  - October 2001, V2 A Qualitative Assessment of Abuse Potential of Long-Acting Opioids Used in the Treatment of Chronic Pain (n=16 focus groups)
  - November 2001, V2 DURAGESIC Message Testing:Incorporating an Abuse-Related Message (n=39)
  - December/January V2 Chronic Pain Message Evaluation (n=242)
  - January 15, 2002, BDN Brand Positioning Workshop
  - March/April 2002, V2 Message Statement Research (n=58)
  - May 29, 2002, Lieberman Perceptual Mapping and Derived Importance (n=540)
  - June 17, 2002, Lieberman Message Laddering (n=540)

DURAGESIC Positioning Statement Events

- Market & Cultural Events
  - OxyContin PI change: June ‘01 - Addition of Black Box Warning
  - Gary Condit: July ‘01 - Questioned regarding the April 30th disappearance of intern Chandra Levy, popular media coverage of OxyContin abuse diminishes
  - September 11th Tragedy - National and international media attention focused entirely upon terrorist attacks and activity, abuse stories forgotten
  - DAWN Data: January ‘02 - FDA announces DAWN Data for 1994-2000, popular media coverage of abuse of LAO’s resumes
  - Oxycontin PI change: January ‘02 - Removal of any references to QOL/mood/sleep (opportunity)
  - State of Virginia: March ‘02 - Legislation introduced with intention to reduce abuse of painkillers through tighter restrictions governing prescriptions, results pending
  - Avinza launch: April ‘02 - Has references to improvements in sleep in OA study (potential threat/noise, esp. with Elan salesforce of 450 PCP reps and 140 Neuro reps)

DURAGESIC Positioning Statement Research & Events Timeline



DURAGESIC Positioning Statement

Conclusions

- Implications of Results
  - Providing patients with consistent relief that helps to improve functionality represents the primary goal of therapy
  - DURAGESIC features and benefits can be crafted to insure ownership of and success with improved functionality message
  - Results underscore that sales training, in addition to revision of promotional materials, must create the appropriate links between consistency, efficacy, and functionality

- New DURAGESIC Positioning Statement
  - *DURAGESIC® significantly improves physical and social functioning by providing the only chronic pain relief that is consistent and effective for up to 72 hours.*

DURAGESIC
Journal Advertising Overview

March 1991-Present

DURAGESIC Ad Campaign Overview

March 1991

- Focus on introduction of patch technology providing 72 hours of relief to malignant chronic pain patients

May 1994

- Promotion of around-the-clock control highlights benefits of 72 hour efficacy in limiting breakthrough pain associated with oral medications
- Shift away from limiting consideration to only malignant patients

April 1995

- Strongly promoting relief from breakthrough pain through illustration of consistent serum level profile

July 1997

- Illustrates an effort to “humanize” chronic pain by focusing on patient benefits of 72 hour dosing & serum levels versus oral medications

October 1998

- Continuing with patient benefits, promotion of treatment simplicity due to 72 hour dosing regimen

October 2000

- First movement towards returning to a more normal life as a patient benefit since 72 hour dosing and less breakthrough pain allow for fewer interruptions
- Current concept exploration grows upon this concept to highlight restoration of functionality as a treatment goal of both patients and physicians

March 1991

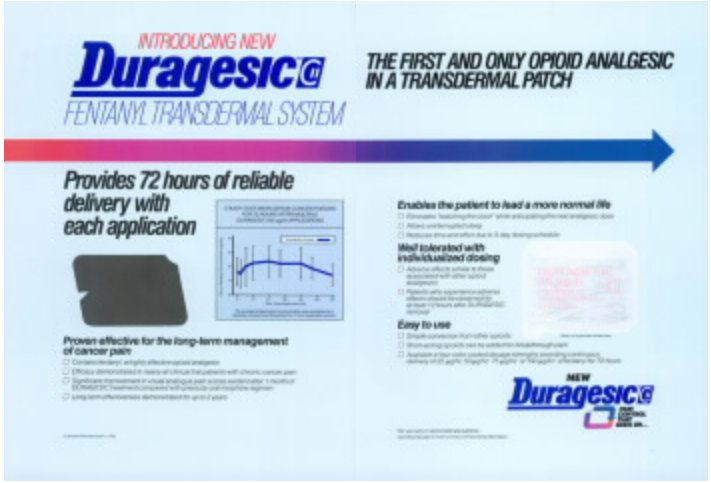
Coming Soon Journal Ad

Headline: Available Soon From Janssen Pharmaceutica New DURAGESIC

Tagline: Pain Control That Goes On…

Format: One Page Journal Ad

April 1991-December 1992



Headline: 72 Hours Of Pain Control In A Transdermal Patch

Tagline: Pain Control That Goes On…

Format: One Page Journal Ad

Now Available Launch Journal Ads

Headline: 72 Hours Of Pain Control From A Single Dose…

Tagline: Pain Control That Goes On…

Format: 3 Page Journal Ad

May 1994-March 1995

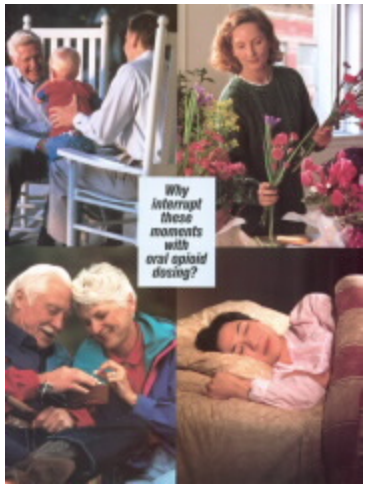
Core Campaign Journal Ad

Headline: Around-the-clock chronic pain control when your patient needs it.

Tagline: Chronic Pain Control That Goes On…

Format: One Page Journal Ad

April 1995-September 1995



Core Campaign Journal Ad

Headline: Why Interrupt These Moments With Oral Opioid Dosing?

Tagline: Chronic Pain Control That Goes On…

Format: 3 Page Journal Ad

July 1997-May 1998

Core Campaign Journal Ad

Headline: "I saw how constipated and groggy the pain pills made my friends. I didn't want those same problems."

Tagline: Stops the Pain. Not the Patient.

Format: Spread Journal Ad

October 1998-September 2000

Core Campaign Journal Ad

Headline: "I didn't have to think twice."

Tagline: Around-the-Clock Living.

Format: Spread Journal Ad

October 2000-Present

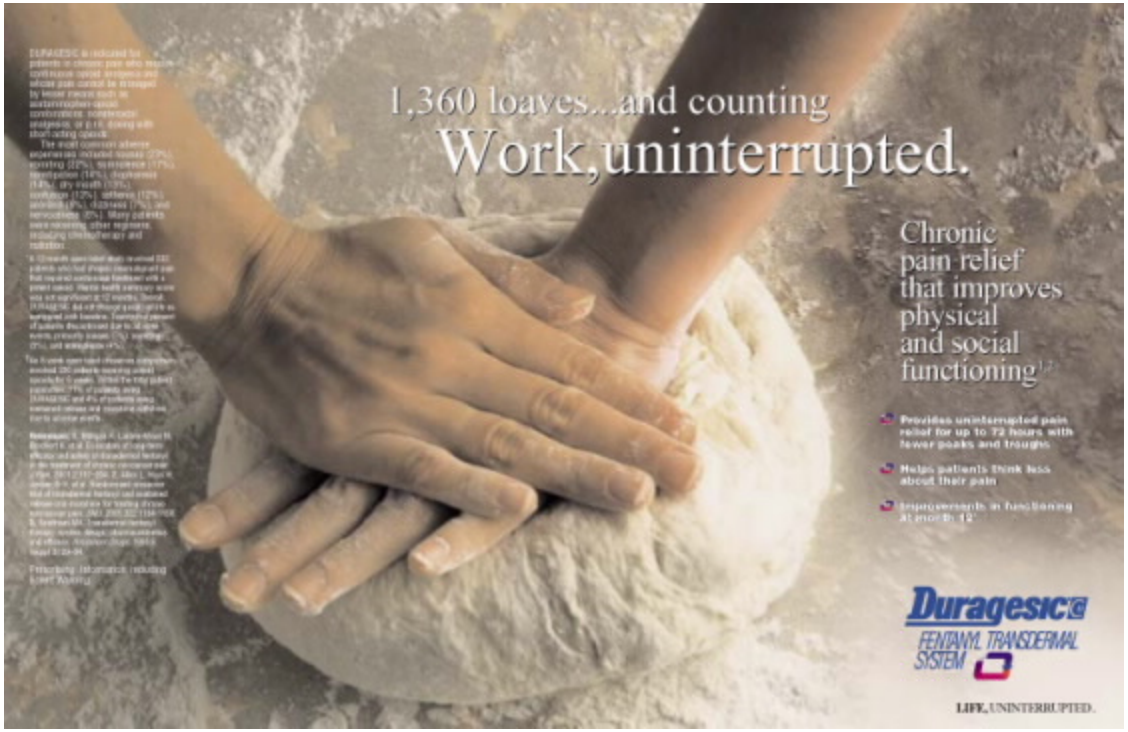
Core Campaign Journal Ad

Headline: "This day will be a lifelong memory. I'm glad chronic pain won't be a part of it."

Tagline: Life, uninterrupted.

Format: Spread Journal Ad

Concept Development



Refreshing Core Campaign Journal Ad

Headline: "1,360 loaves…and counting. Work, uninterrupted."

Tagline: Life, uninterrupted.

Format: Spread Journal Ad

Concept Development

Refreshing Core Campaign Journal Ad

Headline: "506 strikes…and counting. Game, uninterrupted."

Tagline: Life, uninterrupted.

Format: Spread Journal Ad

Concept Development

Refreshing Core Campaign Journal Ad

Headline: "Work. Play. Stand. Sit. Bend. Stretch. Move. Carry."

Tagline: Life, uninterrupted.

Format: Spread Journal Ad

Current DURAGESIC Ad Campaign Research

Rationale

- To optimize revised positioning statement, concept exploration to evolve the “Life, uninterrupted” campaign was initiated

Results

- Qualitative and Eye-Tracking research indicate both the current journal ad and “Baker” concept communicate restoration of physical and social functioning
- Additional qualitative and quantitative research is planned to refine final execution